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SUGAR REPORTS

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MARKET REVIEW

On December 21, the Secretary of Agriculture announced sugar quotas for 1955 amounting to 8.2 million short tons, raw value. Distribution of sugar by refiners, importers, and processors during the 12-month period ended October 31, 1954, amounted to about 8.3 million tons, and inventories of wholesalers, retailers, and industrial users appear to have been reduced by approximately 50 thousand tons. Thus, actual consumption during the base period was around 8.350 million tons. Allowing for an increase of about 1.75 percent in the population, consumption in the calendar year 1955 is estimated at approximately 8.5 million tons. The initial quotas have been set 300 thousand tons below this level, partly to make allowance for possible error in the estimate of demand for sugar, and for a relatively small quantity of constructive deliveries in December 1954, but principally to help stabilize prices at levels consistent with objectives of the Sugar Act.

The initial quotas for 1954 amounted to 8 million tons and were increased in March to 8.2 million tons. In November it became apparent that a further increase was needed to assure adequate supplies for the remainder of the year, and on December 3 the quotas were increased an additional 50 thousand tons. The quota supplies for 1954 were augmented by 126 thousand tons of beet sugar charged to 1953 quota, but physically delivered in 1954. Also, stocks held by wholesalers, retailers, and industrial users, which were unseasonably high at the beginning of 1954, probably have been reduced during the year. Constructive deliveries in 1954 for consumption in 1955 are not expected to exceed 50 thousand tons. Inventories of refiners and importers on January 1, 1955, are expected to be at a very low level and there is no indication that stocks held by wholesalers, retailers, and industrial users will be increased to any extent on that date over the low level of two years earlier.

Immediately following the December 3 increase in 1954 quotas, the entire 48,000-ton increase in the quota for Cuba was certified. On December 20, the uncertified balance of the quota Puerto Rico was 15 thousand tons; for Hawaii, 9 thousand;

and for the Virgin Islands, 1 thousand. Even though port and shipping difficulties continue, it appears that through substitution of sugar among mills the quota for Puerto Rico will be filled.

Distribution of sugar by primary distributors during November amounted to 633 thousand short tons, raw value, as compared to 575 thousand in November 1953. Although a part of this increase was probably due to the fear of a lonshoremen's strike in eastern ports, refiners' deliveries did not increase proportionately with their usual share of the market, while beet processors accounted for more than their usual share.

The price of raw sugar, duty paid at New York, which averaged 6.15 cents per pound for November, ranged between 5.95 and 6.05 cents during the first 20 days of December. Most of the sales which formed the basis for the spot price during those 20 days represented quota sugar for delivery in January. March futures during the first 20 days of December ranged from 5.92 to 5.96 cents, still somewhat below the level of spot prices for delivery in the first month of the year.

There have been no recent changes in the list price of refined sugar in any area. The spread between the wholesale gross price of refined sugar and the price of raw sugar, duty paid at New York, amounted to 2.63 cents per pound during the first 11 months of this year as compared to 2.42 cents for the same period of 1953. However, refined prices in other parts of the country during the first 11 months averaged somewhat lower in relation to the New York wholesale price than had been the case in the comparable period of 1953. Retail sugar prices on a national basis averaged 10.5 cents per pound for the first 10 months of 1954, approximately the same as for the comparable period of 1953.

The price of Cuban sugar for the world market during the first 20 days of December ranged between 3.14 and 3.25 cents per pound. This price averaged 3.27 cents for the first 11 months of 1954. The premium for United States quota sugar over sugar for the world market averaged 1.96 cents for January-November 1954 as compared to 2.03 cents for the same months of 1953.

INTERNATIONAL SUGAR COUNCIL MEETING
LONDON, ENGLAND
NOVEMBER 24-25, 1954

The International Sugar Council estimated world free market requirements in 1955 to be 4,400,000 metric tons, raw value (table 1).

Table 1. - Estimated World Free Market Sugar Requirements,
Calendar Year 1955.

<u>Importing Area</u>	<u>Requirements</u> (1,000 Metric tons, raw value)
British Commonwealth <u>1/</u>	619
Finland	120
Germany (Western)	230
Netherlands	115
Norway	135
Switzerland	185
Other Europe <u>2/</u>	228
Chile	180
Other Latin America <u>2/</u>	186
Africa (Other than British and French areas)	50
India	700
Pakistan	110
China (Mainland)	100
Japan	800
Iran	180
Iraq	110
Other Asia <u>2/</u>	275
Oceania (Excl. New Zealand)	5
Non-statistical consumption	72
Total	<u>4,400</u>

1/ British Commonwealth sugar requirements were estimated at 4,063,000 tons, Commonwealth countries' supplies at 3,204,000 tons, and reduction of stocks at 240,000 tons. This leaves 619,000 tons to be supplied by the free market.

2/ Countries with individual requirements of less than 100,000 tons. Those requiring more than 50,000 tons are: Greece (80); Bolivia (65); Uruguay (80); Saudi Arabia (60); Syria (55).

The basic export tonnages established in the International Sugar Agreement for participating countries amount to 4,615,000 tons.

The Council considered the quantities of sugar which non-participating countries might be expected to export and decided to set 1955 export quotas of participants at the minimum level of 3,709,000 tons, authorized in the International Sugar Agreement. This reflects a 20 percent cut in all basic export tonnages of 50,000 or more, and a 10 percent cut in all smaller basic export tonnages.

Table 2.- World Free Market Quotas, Participating Exporting Countries, Calendar Year 1955

<u>Country</u>	<u>Quota</u> (Metric tons, raw value)
Belgium and Belgian Congo <u>1/</u>	39,775
Brazil	139,213
China (Taiwan)	477,300
Cuba	1,789,877
Czechoslovakia <u>3/</u>	218,763
Dominican Republic	477,300
French Union <u>1/</u>	18,000
Haiti	40,500
Hungary	36,000
Mexico	59,662
Netherlands (Incl. Surinam) <u>1/</u> <u>2/</u>	36,000
Philippines	22,500
Poland <u>3/</u>	175,010
USSR <u>3/</u>	159,100
Unallotted reserve	<u>20,000</u>
Total	3,709,000

- 1/ In addition to the quotas, these countries may export 175,000 tons among themselves and the Federal Republic of Germany.
- 2/ The Netherlands has the status of an exporter in the Agreement, but is expected to be a net importer in 1955(table 1).
- 3/ Czechoslovakian and Polish exports to the USSR are outside the Agreement.

The European beet campaign was still in progress when sugar supplies and requirements for 1955 were estimated. Since yields are not normal this year, final production figures may change the supply and requirements situation for 1955 later on.

By voluntary action, the Council created an unallotted 20,000-ton reserve to meet cases of special hardship. The reserve was

deducted pro rata from quotas of participating exporting countries with basic export tonnages of 50,000 tons or more. Individual quotas are shown in table 2.

The Council unanimously elected Mr. Lawrence Myers (United States) as its Chairman, and Monsieur H. Janton (France) as its Vice Chairman, for 1955.

The following importing countries have ratified the Agreement: Canada, Germany (Western), Japan, Lebanon, Portugal, the United Kingdom, and the United States. Greece has not completed ratification, but is expected to do so soon. Exporting countries that have ratified the Agreement are shown in table 2, except that Brazil has not yet completed the ratification process. Australia and the Union of South Africa have also ratified the Agreement as exporters, but they have no free market quotas since all their exports go to British Commonwealth countries.

WAGE DETERMINATIONS UNDER THE SUGAR ACTS

By

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Historically, labor laws of the United States have been designed to aid industrial and trade workers. Farm workers, generally, have not been given the protection of legislation affecting the wages and welfare of industrial wage earners. While agricultural workers are included in labor legislation enacted in some states (and in Puerto Rico and Hawaii), the vast majority is not covered. A unique feature of the law under which the sugar industry of the United States operates is the wage provision applicable to fieldworkers employed on sugar beet and sugarcane farms.

Since 1934, sugar legislation has provided for the protection of fieldworkers employed in the domestic sugar industry--the sugar beet area, mainland cane area (Louisiana and Florida), Hawaii, Puerto Rico, and since 1942, the Virgin Islands. From time to time the Department receives inquiries from persons interested in the labor phase of the program--its background, how it operates, and its results. It is the purpose of this article to describe briefly the principal features of the wage provisions of the Sugar Act.

AUTHORITY

The sugar program of the United States as set forth in the Sugar Act of 1948, as amended, and in preceding legislation (the Sugar Act of 1937 and the Jones-Costigan Act of 1934), is designed to maintain a healthy domestic industry, to promote our general export trade, and to assure adequate sugar supplies to consumers at reasonable and stable prices. To accomplish these purposes, the Act establishes fixed sugar quotas for the domestic areas and the Philippines, and variable quotas for certain other foreign supply areas. It also establishes marketing allotments to primary marketers and importers, and provides for payments to producers of sugar beets and sugarcane. In order to be eligible for such payments, producers must meet certain conditions which, among others, include the payment to fieldworkers of wage rates not less than those determined by the Secretary to be fair and reasonable.

The specific authority for the issuance of fair and reasonable wage determinations is found in Title III of the Sugar Act of 1948, as amended. Section 301(c)(1) provides "That all persons employed on the farm in the production, cultivation, or harvesting of sugar beets or sugarcane with respect to which an application for payment is made shall have been paid in full for all such work, and shall have been paid wages therefor at rates not less than those that may be determined by the Secretary to be fair and reasonable after investigation and due notice and opportunity for public hearing; and in making such determinations the Secretary shall take into consideration the standards therefor formerly established by him under the Agricultural Adjustment Act, as amended, and the differences in conditions among various producing areas: Provided, however, That a payment which would be payable except for the foregoing provisions of this subparagraph may be made, as the Secretary may determine, in such manner that the laborer will receive an amount, insofar as such payment will suffice, equal to the amount of the accrued unpaid wages for such work, and that the producer will receive the remainder, if any, of such payment. . . ."

The wage provisions of the current legislation are the same as those of the original Sugar Act of 1937. Under the Jones-Costigan Act of 1934, the Secretary also was authorized to establish wage rates for sugar beet and sugarcane fieldworkers. This authority was formalized in the production adjustment contracts entered into between the Secretary and individual sugar beet and sugarcane producers.

BACKGROUND

The wage provisions of sugar legislation were developed during a period when the national economy was at a depression level. The world sugar depression had begun in 1925, but did not seriously affect the sugar industry of the United States until 1930. The Jones-Costigan amendment in 1934 to the Agricultural Adjustment Act was enacted to alleviate the economic condition of the industry.

During consideration of legislation to give the industry benefits which would accrue from classification of sugar beets and sugarcane as basic commodities under the Agricultural Adjustment Act, attention was focused upon the fieldworkers in the sugar industry. During the depression period, the industrial recession released large numbers of workers to an already overburdened migratory agricultural labor force. Because of the high hand-labor requirements of sugar beet production, the sugar beet industry employed thousands of migratory workers, and frequent reference was made to employment conditions among this group of workers. As a consequence, the President appointed in 1933 a Committee on Labor Conditions in the Growing of Sugar Beets whose function was "the immediate formulation of a plan which will place the labor policies of sugar beet production on a reasonable and equitable basis." After a study of the situation, this Committee unanimously recommended that if sugar beets were made a basic commodity, and benefits were paid to these farmers, the Secretary of Agriculture should be given power to fix minimum wages for sugar beet workers. The Jones-Costigan Act, approved May 9, 1934, authorized the Secretary to include minimum wages for fieldworkers in any agreements entered into with producers relating to sugar beets or sugarcane. The Secretary was also authorized upon request from workers or growers, to adjudicate any dispute as to the terms of labor contracts under which sugar beets or sugarcane were grown. The production adjustment agreements entered into between the Secretary and producers of sugar beets and sugarcane contained provisions which authorized the Secretary to establish minimum wages to be paid to workers for the 1935 and 1936 crops and, where necessary, the time and method of payment. The labor provisions of the contract also required the producer to pay promptly all bona fide wage claims in connection with the 1934 crop. The producer agreed to abide by the decision of the Secretary with respect to any labor dispute involving the producer when any such dispute had been presented to the Secretary for adjudication.

Only one wage rate determination was issued by the Secretary under

the Jones-Costigan Act. That determination was effective for the 1935 crop of sugar beets in eastern Colorado, Nebraska, Wyoming, and Montana. No action was requested elsewhere in the domestic area. The Secretary's authority to fix wages for fieldworkers was terminated by a decision of the Supreme Court on January 6, 1936, which invalidated the production adjustment and processing tax phases of the Jones-Costigan Act.

In 1937, the President recommended that Congress enact new legislation embodying in general the principles of the Jones-Costigan Act. In recommending this legislation, the President in his message to Congress stated, "It is also highly desirable to continue the policy which was inherent in the Jones-Costigan Act of effectuating the principle that an industry which desires the protection afforded by a quota system or a tariff should be expected to guarantee that it will be a good employer. I recommend, therefore, that the prevention of child labor and the payment of wages not less than minimum standards be included among the conditions for receiving Federal payment."

The resulting legislation, the Sugar Act of 1937, was approved on September 1, 1937. It contained specific provisions for determination by the Secretary of fair and reasonable wage rates for workers employed on the farm in the production, cultivation, or harvesting of sugar beets and sugarcane which the producer was required to pay to be eligible for payments under the Act. It also authorized the Secretary to recommend terms of agreements between producers and workers and to conduct surveys essential to the administration of the Act. Subsequent extensions and reenactment of this basic legislation have contained similar labor provisions.

STANDARDS

The standards specified for determining minimum wages under the Jones-Costigan Act, and restated in the production adjustment contracts, was "a fair and equitable division" of the proceeds from growing and marketing sugar beets and sugarcane and the products thereof. This standard related to wage rates closely to producer income. At hearings held in 1935 for the one determination issued under the Jones-Costigan Act, producers and workers were unable to agree upon more detailed standards. In the determination which was subsequently issued, the Secretary considered the following factors: (1) relation of wages to gross income from sugar beets per acre; (2) relation of wages to the price of sugar beets per ton; (3) relation of labor costs to total costs; and (4) cost of living.

In the development of the Sugar Act of 1937, the problem arose as to the standards which might be specified for wage determination purposes. As finally enacted, the 1937 Act provided that in determining fair and reasonable wage rates the Secretary should take into consideration the standards which were considered under the Agricultural Adjustment Act, i. e., the standards used in developing the one wage determination issued under the Jones-Costigan Act. In addition, the Act specified that differences in conditions among the several producing areas were to be considered.

While the reference to standards in the 1937 Act has not been modified in extension and reenactment of that legislation, technological developments and changes in economic conditions have been considered in the application of the standards.

During the past 20 years significant strides have been made in most of the domestic sugar-producing areas. Substantial changes have occurred in yields of sugar beets and sugarcane, sugar recoveries, labor inputs, and production methods. The effect of these changes has been to alter the relationships which existed between wages and sugar prices, income per ton and per acre of sugar beets and sugarcane, and the percentage relationship between labor costs and total costs. Accordingly, the wage rates indicated by application of the prescribed standards in recent years are viewed in the perspective of current economic conditions and production practices.

To effectively administer the wage provisions of the Sugar Acts, certain criteria have been utilized in formulating wage determinations. Among the most important of these are: (1) minimum wage rates should not be established at levels which would substantially reduce production and thereby deny employment opportunities to workers; (2) minimum rates should not be established at levels which preclude bargaining for higher rates which then become the effective fair and reasonable wage; (3) generally, the minimum wage for similar work should be applicable regardless of size or efficiency of the farm on which the work is performed; and (4) the interests of producers and workers are best served by primary attention to long-term trends rather than short-term movements of wages in accord with transient income or price fluctuations.

To recognize these factors, the following standards have been developed, all of which are considered in making wage determinations:

1. Negotiated wages. Wage rates which are negotiated between

qualified producer and worker organizations may be adopted as fair and reasonable wage rates. In evaluation of this standard, consideration is given to the relative bargaining ability of the parties. At the present time, a strong labor union organization exists in the Territory of Hawaii. In Puerto Rico there is one large labor union as well as several small unions which deal with individual producers or groups of producers. In other areas, collective bargaining is not practiced to any considerable extent.

2. Cost of living. Fair and reasonable wage rates recognize the trends in living costs as measured from an appropriate base period. In the continental United States the Consumer Price Index, published by the U. S. Department of Labor, is used. In Puerto Rico and Hawaii, indexes published by the Commonwealth and Territorial Governments are used. Generally, only the items of food and clothing are considered, inasmuch as these two items represent the major expenditures by sugar beet and sugarcane fieldworkers. Consideration is given to the differences in the purchasing habits of fieldworkers as contrasted with urban wage earners.

3. Differences in Producing Areas. Fair and reasonable wage rates recognize differences in the economic position of producers and workers in the several producing areas. One of the most significant differences among various domestic areas relates to the man-hour input required to produce a unit of product. In addition, there are wide differences in the yield of sugar beets and sugarcane per acre, recovery of sugar from a given quantity of sugar beets or sugarcane, production practices, and marketing costs.

4. Ability to pay. This standard encompasses the economic position of producers in relation to available market returns. Analyses are made of the income to the producer per acre and per ton of sugar beets or sugarcane, and per hundredweight of raw sugar. Detailed analyses are made of the costs of producing sugar beets and sugarcane and net returns. These analyses give consideration to the changes which have occurred in yields of sugar beets or sugarcane, recoveries of sugar, mechanization, changes in production methods and worker efficiency. The basic information is obtained from detailed field cost studies made by the Department in all producing areas. Generally, the studies covering sugar beet or sugarcane production do not include small farms which employ only a few hired workers, but rather include a scientifically constructed sample of medium and large-sized farms which account

for the bulk of sugar beet or sugarcane production and are usually the farms which employ a number of hired workers.

The above standards are not assigned specific weights, as their relative importance varies from area to area and from time to time.

Numerous problems have arisen in making wage determinations. These are considered in the light of generally accepted labor-management practices modified to recognize the special aspects of agricultural production. As a general practice: (1) although emphasis is placed on the wage for unskilled workers, wage differentials for skilled workers are established in accord with historical differences; (2) piecework rates, where specified, are established at levels which should return to workers higher hourly earnings than the specified time basis rate for the same operation; (3) individual producers are required to furnish workers perquisites furnished in prior years; (4) wage-price escalator devices are used only where agreed upon or where special situations warrant; (5) wage rate payments are required to be made in cash subject to deductions which the producer is required by law to make or as agreed upon with the worker; (6) wage differentials due to age, handicap, or apprenticeship may be specified provided adequate qualifications are established; (7) the earnings of workers employed on piecework for which no rate is specified must be not less than the time rate provided for the operation performed.

As with other provisions of the sugar legislation, the wage provisions must be considered in the light of action which will maintain the domestic producing industry and provide adequate supplies of sugar to consumers at reasonable prices. While the Sugar Act is a price-influencing mechanism, it is not a price-fixing one, and competitive forces act with relative freedom. The domestic sugar market is not completely insulated from the world sugar market, and this factor must receive consideration in long-term planning of wage actions under the Sugar Act.

PROCEDURE AND ADMINISTRATION

The Sugar Act provides that fair and reasonable wage determinations shall be issued by the Secretary "after investigation and due notice and opportunity for public hearing." Accordingly, the Sugar Division has held annual public hearings in each of the domestic sugar-producing areas. Hearings generally are held a few months prior to the beginning of the period to which the determination will

apply. In recent years, hearings have been held in public meeting places in six locations in the sugar beet area and in one location in each of the sugarcane areas of Louisiana, Florida, Hawaii, Puerto Rico, and the Virgin Islands.

Regulations governing practice and procedure applicable to the holding of public hearings are issued by the Department. These regulations require that a notice of hearing be published in the Federal Register at least 10 days prior to the hearing date, that the hearing be publicized by a press release, and that copies of the notice of hearing be directed to grower and labor groups known to be interested in the proceedings. The notice of hearing must contain a statement of the purpose of the hearing, the time and place of the hearing, and the names of the presiding officers. The presiding officers must be employees of the Department--generally, the persons designated have been representatives of the Sugar Division. If the Department desires to make a formal proposal with respect to the determination, it is made a part of the hearing notice. Frequently the notice of hearing also is used to direct attention of interested parties to problems or conditions with respect to which the Department desires information and recommendations.

The regulations require that all interested persons appearing at the hearing shall be given reasonable opportunity to offer evidence with respect to the matters specified in the notice of hearing. Each witness is sworn before proceeding to testify. The presiding officers are required to confine the evidence to the questions before the hearing, but do not apply the technical rules of evidence. Each witness is subject to questioning by the presiding officer or other representatives of the Department. Other persons in attendance may ask questions of the witness, but cross-examination is not allowed except at the discretion of the presiding officer. Written arguments based on the evidence received at the hearing may be filed within a stated period announced for the filing of supplemental briefs. Testimony given at the hearing is reported verbatim, and any person desiring a copy of the transcript may obtain it through arrangement with the reporter for the customary fee.

Investigations by the Sugar Division of matters pertaining to fair and reasonable wage rates are a continuing process in all the domestic sugar-producing areas. Investigations include analyses of contracts between producers and workers, legislative developments affecting employer-employee relationships, the economic positions of producers and workers, developments in production

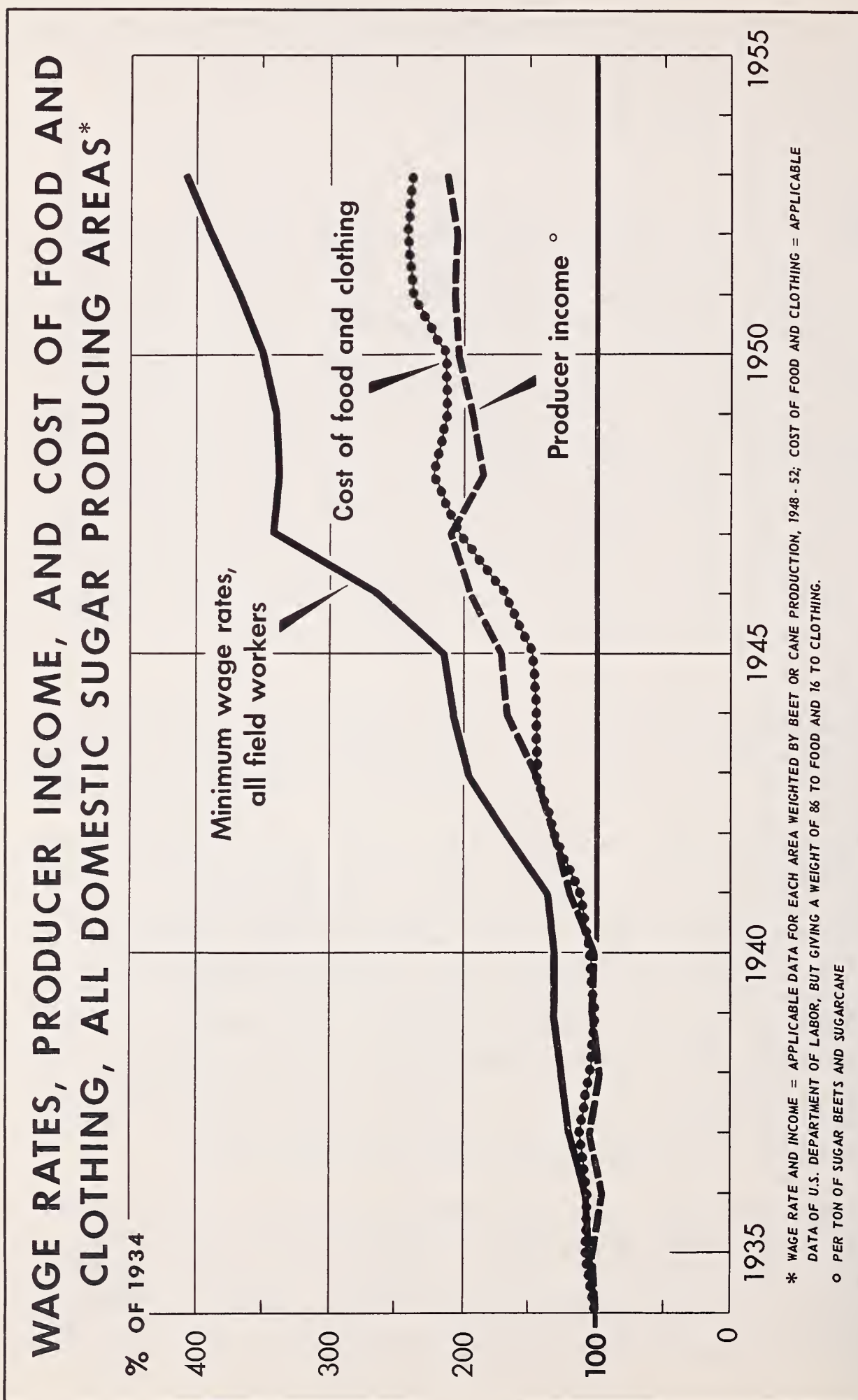


Figure 1

MINIMUM WAGE RATES AND AVERAGE EARNINGS OF FIELD WORKERS, BY AREAS, 1953

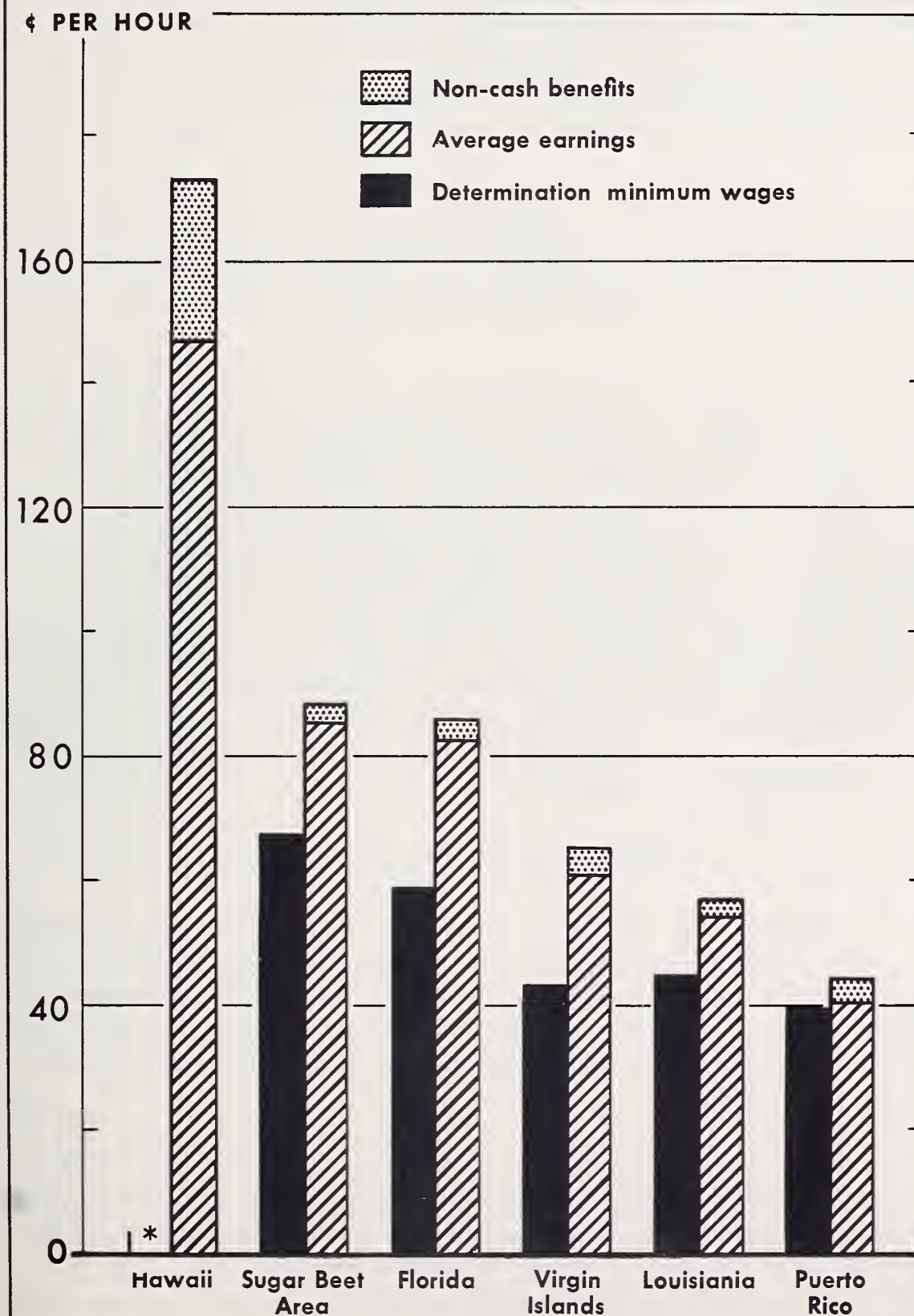


Figure 2

practices, labor performance, and special studies of problems pertaining to particular aspects of the wages of sugar beet and sugarcane fieldworkers in any area. Statistical data and other information are obtained from area, state, and county offices of the Department, from producers and workers through reports and questionnaires, and directly by Sugar Division personnel on field trips or at public hearings. As mentioned earlier, comprehensive data on returns and costs of producing sugar beets and sugarcane are obtained through field cost studies made by the Sugar Division.

The wage determination for a particular area is applicable to a stated crop, calendar year, or other designated period. It is issued by the Secretary as soon as practicable following the public hearing so that producers and workers may have prompt knowledge of the wage requirements.

Announcements of determinations of fair and reasonable wage rates are made to the press, and copies are forwarded to area, state, and county offices of the Department for distribution among producers, workers, processors, and other interested persons. The wage determinations applicable in the sugar beet areas and in Puerto Rico are translated to Spanish for the benefit of the Spanish-speaking workers and producers in these areas. Various associations within the sugar industry reproduce newly issued determinations in their publications. To assist the departmental officials in the field in their administration of the determinations, the Department issues instructions and interpretations covering the various provisions of each determination.

PROGRAM RESULTS

In 1953, the wage rates established in determinations issued under the Sugar Act were about four times as high as those which existed in 1934 (figure 1). As between the several areas, the increases are about 800 percent in Hawaii; 600 percent in the Virgin Islands; 300 percent in Louisiana, Florida, and Puerto Rico; and 160 percent in the sugar beet area.

The most significant increases in wage rates of fieldworkers in Hawaii occurred after 1945 as a result of continued improvements in production methods and when collective bargaining agreements, negotiated between the plantation companies and the labor union, became an effective instrument of wage resolution. Between 1945 and 1953, the minimum wage rates of the collective agreements increased 425 percent. In the Virgin Islands, substantial

Table 3.- Estimates of sugarcane workers, producers, and processors' share of total proceeds from sugar, molasses, and Sugar Act payments, and sugar beet workers, producers, and processors' share of net proceeds from sugar, molasses, and Sugar Act payments - Crop Years 1948-53

Year and Participation	Sugar Beet Area	Louisiana	Florida	Hawaii	Puerto Rico	Virgin Islands
Percent of total						
<u>1948</u>						
Farm Workers share	24	35	31	25	30	57
Producers' share excluding payments to farm workers	39	33	25	27	31	-
Processors' share including payments to factory workers	37	32	44	48	39	43
<u>1949</u>						
Farm Workers share	22	31	26	25	30	59
Producers' share excluding payments to farm workers	40	35	36	31	32	-
Processors' share including payments to factory workers	38	34	38	44	38	41
<u>1950</u>						
Farm Workers share	21	25	22	23	32	-
Producers' share excluding payments to farm workers	42	41	37	32	30	-
Processors' share including payments to factory workers	37	34	41	45	38	-
<u>1951</u>						
Farm Workers share	20	35	22	21	29	41
Producers' share excluding payments to farm workers	43	28	41	32	33	16
Processors' share including payments to factory workers	37	37	37	47	38	43
<u>1952</u>						
Farm Workers share	21	32	22	22	32	52
Producers' share excluding payments to farm workers	41	35	40	31	29	5
Processors' share including payments to factory workers	38	33	38	47	39	43
<u>1953</u>						
Farm Workers share	19	32	25	24	31	39
Producers' share excluding payments to farm workers	43	37	37	30	30	18
Processors' share including payments to factory workers	38	31	38	46	39	43

GENERAL NOTE: Although wages have increased substantially in relation to growers' income since 1948, man-hour requirements have been reduced significantly through mechanization and other technological improvements. Such changes have required higher outlays for non-labor costs so that the participation of workers in total proceeds has declined moderately in some areas.

wage increases occurred subsequent to 1950 when the Municipal Council of the Island of St. Croix enacted minimum wage legislation for industrial and agricultural workers. Wage rates in the other areas have shown a relatively sustained progressive increase throughout the span of years covered by the wage determinations. Compared with two of the significant factors generally considered in wage determinations, income to producers and cost of living, wage rates maintained a favorable position through 1945. Since that time, wage rates have advanced at a much faster rate than either of those two factors.

The data in figure 1 refer to "minimum" fair and reasonable wage rates issued under the Sugar Act. Earnings of workers, which are influenced by the wage determination rates, average substantially higher than minimum wages in most producing areas. Figure 2 shows the levels of minimum wages and average earnings of sugar beet and sugarcane fieldworkers in 1953 with and without non-cash or "fringe" benefits. Cash earnings of workers reflect the payment of wage rates higher than the minimums of the determinations as well as overtime and other incentive payments. Fringe benefits, shown separately, include pensions, housing and other perquisites, medical attention, paid holidays, workmen's compensation insurance, unemployment compensation insurance, and the costs of furnishing perquisites to workers in excess of the charges to workers for such perquisites in those instances where a charge is made. In all areas, except Puerto Rico, average earnings of workers are notably above the minimum wages of the determination. In Puerto Rico, wage payments to fieldworkers, exclusive of fringe benefits, tend to cluster around the minimum wage levels. In collective agreements covering about one-half of the workers in Puerto Rico, a wage payment slightly in excess of the minimums of the wage determinations has been negotiated in recent years.

Participation of fieldworkers, producers, and processors in the proceeds from sugar, molasses, and Sugar Act payments in the period covered by the Sugar Act of 1948 is shown in table 1. The share retained by processors has remained relatively stable over those years. In contrast, the share paid to fieldworkers in relation to the share retained by producers has varied to a greater extent. The effects of exceptionally poor or good crops have contributed towards this fluctuation. More important, however, have been the continuing changes in methods of production which have necessitated larger outlays for equipment and supplies while making possible a reduction in man-hour requirements and a higher rate of pay per hour.

SUGAR ACT OF 1948 - ADMINISTRATIVE ACTIONS

Date announced	<u>Administrative action</u>
November 26, 1954	Revisions to clarify and make more specific requirements relative to marketing of sugar produced or refined from Mainland sugar. For such sugars, the marketing is the basis for charging quotas. Major revisions are: (1) to apply to quotas of year in which sales of sugar is initiated, actual delivery must be made before March 1 of following year; (2) until release is authorized, sugar marketed under bond for refining pending quota availability must be held at refinery at which it was received. The revised marketing definition becomes effective January 1, 1955.
November 30, 1954	Increase of 50,000 short tons, raw value, in 1954 sugar quotas, to become effective December 3, 1954. This brings to 8,250,000 tons the total quotas for 1954.
December 8, 1954	Minimum wage rates producers in California and adjacent regions must pay for the production, cultivation, or harvesting of the 1955 sugar beet crop if they wish to be eligible for Sugar Act payments. Rates are the same as for the 1954 crop, except that a minimum rate of 75 cents per hour for specified harvesting operations has been extended to cover workers who pick up sugar beets left in the field by mechanical harvesting and loading equipment.
December 10, 1954	Proration of a 50,000 100-pound bag deficit of one processor under the 1954 marketing allotment to 10 other sugar beet processors. Prorations were made only to those processors who notified the Department they were able to supply the

Date announcedAdministrative action

additional sugar.

December 17, 1954

Fair and reasonable prices for the 1955 Virgin Islands sugarcane crop. This price determination is the same as the one for the 1954 crop, except that a change has been made in the provision relating to allowances processors must make to producers for transporting sugarcane (in effect by agreement between producers and processors for the 1954 crop).

December 17, 1954

Minimum wage rates Virgin Islands producers must pay sugarcane fieldworkers in the production, cultivation, or harvesting of sugarcane during the 1955 calendar year. These rates are the same as those in effect for the calendar year 1954.

December 21, 1954

Sugar quotas for 1955 totaling 8,200,000 short tons, raw value, determined. Consumption of 8,500,000 tons in 1955 is currently expected. Initial quotas were established at 300,000 tons below expected consumption to make allowance for possible error in the estimated demand for sugar and for a relatively small quantity of constructive deliveries in December 1954, but principally to help stabilize sugar price at levels consistent with the objectives of the Sugar Act. This compares with quotas for 1954 initially set at 8 million tons and subsequently raised by two actions to 8.250 million tons.

December 21, 1954

Quotas determined for local consumption in Hawaii and Puerto Rico 40,000 and 100,000 short tons, raw value, respectively, for 1955. These are the same as the quotas for 1954.

STATISTICAL SERIES IN THIS ISSUEHIGHLIGHTS

1. Sugar deliveries for United States consumption in November 1954, 633,000 short tons, 58,000 tons larger than in November 1953, and only about 9,000 tons smaller than in October 1954. In 1953, the decrease from October to November was about 65,000 tons.
2. Total sugar deliveries for United States consumption for the January-November 1954 period, 7,544,000 tons, about 139,000 tons smaller than during corresponding period of 1953.
3. Sugar stocks held by primary distributors on December 4, 1954, 1,782,000 tons, about 107,000 tons larger than on November 30, 1953. Beetprocessors' stocks were up about 145,000 tons, importers' stocks about 7,000 tons, and refiners' stocks down about 45,000 tons.
4. Charges against quotas during January-November 1954, 7,807,000 tons, 0.4 percent less than during the corresponding 1953 period. Decreases in charges to quotas were shown for Hawaii, Puerto Rico, the Virgin Islands, Cuba, and the "full duty" countries; increases were shown for the mainland beet and cane areas and the Republic of the Philippines.

Unfilled balances of quotas as of December 20, 1954, were as follows: domestic beet area, 78,955 tons; mainland cane area, 15,000 tons; Hawaii, 9,491 tons; Puerto Rico, 15,013 tons; Virgin Islands, 1,477 tons; Republic of the Philippines, 0; Cuba, 0; "full duty" countries, 169 tons. Total, 120,105 tons.

5. Deliveries of sugar during the third quarter ranged from 17 to 50 percent larger in all geographic areas of the continental United States than in the second quarter of 1954, except in the North Central States where they declined 245,000 bags, about 2 percent. The increases were: Western States, 2,478,000 bags, 50.3 percent, where canning operations require increased quantities of sugar at that time of year; Southern States, 1,880,000 bags, 17.2 percent; Middle Atlantic States, 1,547,000 bags, 18.0 percent; and New England States, 374,000 bags, 20.9 percent.

Compared with last year, deliveries during third quarter of 1954 were smaller by from 5 to 14 percent, except in the South where they were 277,000 bags, 2 percent larger. Deliveries to the New England and Western States were 4.8 percent less, down 109,000 and 375,000 bags, respectively. Deliveries to the Middle Atlantic States were 6.7 percent less, down 729,000 bags, and to the North Central States, 14.3 percent less, down 1,903,000 bags.

Table 4.- Distribution of sugar by primary distributors in the continental United States, Puerto Rico, and Hawaii during January - October 1954 and 1953

	<u>1954</u> (Short tons, raw value)	<u>1953</u> (Short tons, raw value)
<u>Continental United States</u>		
Refiners' raw	972	2,614
Refiners' refined	4,869,026	5,133,455
Beet processors	1,463,535	1,364,104
Importers' direct-consumption	524,672	555,010
Mainland cane mills' direct-consumption	<u>76,318</u>	<u>78,522</u>
Total	6,934,523	7,133,705
Deliveries for export, livestock feed, etc.	23,460	25,413
For continental consumption <u>1/</u>	6,911,063	7,108,292
<u>Puerto Rico</u>	77,935	72,757
<u>Hawaii</u>	34,246	39,289

1/ Includes deliveries for United States military forces at home and abroad.

Table 5.- Stocks of sugar held by primary distributors in the continental United States, October 31, 1954 and 1953

	<u>1954</u> (Short tons, raw value)	<u>1953</u> (Short tons, raw value)
Refiners' raw	213,652	251,290
Refiners' refined	230,068	263,648
Beet processors	741,732	613,434
Importers' direct consumption	52,987	26,319
Mainland sugarcane mills	<u>22,774</u>	<u>31,023</u>
Total	1,261,213	1,185,714

Table 6.- Raw sugar: Refiners' stocks, receipts and meltings
January - October 1954

	: Stocks :	:	:	: Deliveries :	Stocks
Source of	: Jan. 1, :	:	:	: for direct :	Oct. 31,
supply	: 1954 :	Receipts:	Meltings	: consumption:	1954
		(short tons, raw value)			
Cuba	17,905	2,162,244	2,138,166	163	41,820
Hawaii	59,041	840,648	818,230	0	81,459
Mainland cane	67,819	186,463	212,875	205	41,202
Philippines	29,250	925,273	934,478	212	19,833
Puerto Rico	13,414	732,318	716,613	392	28,727
Virgin Islands	0	4,279	4,279	0	0
Other countries	512	54,776	54,677	0	611
Not identifiable	0	73	73	0	0
Total	187,941	4,906,074	4,879,391	972	213,652

Source: Compiled from reports submitted on Form SU-15A by cane sugar refiners.

Table 7.- Refined sugar: Refiners and processors' stocks,
production and deliveries, January - October 1954

	Cane sugar (short tons, raw value)	Beet sugar (short tons, raw value)
Stocks, January 1, 1954	217,064	1,122,852
Production	4,883,609	1,083,301
Received from other primary distributors	5,517	8,129
Deliveries for consumption	4,869,026	1,463,535
Deliveries to other primary distributors	7,096	9,015
Stocks, October 31, 1954	230,068	741,732

Source: Compiled from reports submitted on Form SU-16A and SU-11C by cane sugar refiners and beet sugar processors.

Table 8.- Direct-consumption sugar: Importers' stocks,
receipts and deliveries - January - October 1954

	⌘	Stocks	⌘		⌘	Stocks	⌘
Source of	⌘	Jan. 1,	⌘	Receipts	⌘	Deliveries	⌘
supply	⌘	1954	⌘		⌘		⌘
		(short tons, raw value)					
Cuba		2,780		372,807		337,671	37,916
Hawaii		2,194		25,126		22,672	4,648
Philippines		322		6,574		6,632	264
Puerto Rico		0		123,648		119,466	4,182
Other countries		6,076		38,132		38,231	5,977
Total		11,372		566,287		524,672	52,987

Source: Compiled from reports on Form SU-15B submitted by importers of direct-consumption sugar.

Table 9.- Mainland Sugarcane mills' stocks, production and deliveries of sugar, January-October 1954

	short tons, raw value
Stocks January 1, 1954	104,006
Production	180,870
Deliveries	
For further processing	185,784
For direct-consumption	76,318
Total	262,102
Stocks October 31, 1954	22,774

Source: Compiled from reports submitted by mainland sugarcane processors and processor-refiners.

Table 10.- Distribution of sugar by primary distributors in the continental United States, November and January-Nov. 1954 and 1953

	1954 1/		1953	
	November	Jan.-Nov.	November	Jan.-Nov.
	(short tons, raw value)			
Refiners	449,559	5,319,557	424,296	5,560,365
Beet processors	150,814	1,614,349	118,618	1,482,722
Importers	24,320	548,992	16,241	571,251
Mainland sugarcane mills	10,121	86,439	21,430	99,952
Total	634,814	7,569,337	580,585	7,714,290
Deliveries for export, livestock feed, etc.	1,607	25,067	5,685	31,098
For continental consumption 2/	633,207	7,544,270	574,900	7,683,192

1/ Preliminary.

2/ Includes deliveries for U. S. military forces at home and abroad.

Table 11.- Stocks of sugar held by primary distributors in the continental United States, December 4, 1954 & November 30, 1953

	December 4, 1954	November 30, 1953
	(short tons, raw value)	
Refiners' raw	248,183	245,324
Refiners' refined	211,142	259,362
Beet processors	1,207,696	1,062,814
Importers	23,209	15,825
Mainland sugarcane mills	91,873 2/	91,873
Total	1,782,103	1,675,198

1/ Preliminary.

2/ Not available; estimated same as preceding year.

Table 12.- Status of 1954 sugar quotas as of November 30, 1954

Area	Quota ^{1/}	Credit for drawback of duty	Charge to quota and offset to drawback of duty ^{2/}	Unfilled balance	
				Total	Within direct consumption limits for offshore areas
short tons, raw value					
Domestic beet	1,800,000	-	1,615,471	184,529	-
Mainland cane	500,000	-	457,638	42,362	-
Hawaii	1,052,000	-	964,685	87,315	2,635
Puerto Rico	1,080,000	-	1,010,784	69,216	300
Virgin Islands	12,000	-	4,275	7,725	-
Republic of the Philippines	974,000	-	973,952	48	48
Cuba	2,718,720	4,542	2,674,891	48,371	24
Other foreign countries (see below)	<u>113,280</u>	<u>1,398</u>	<u>104,972</u>	<u>9,706</u>	<u>672</u>
Total	8,250,000	5,940	7,806,668	449,272	-
Foreign countries other than Cuba and Republic of the Philippines					
Dominican Republic	29,401	595	29,413	583	)
El Salvador	0 ^{3/}	0	0	0	)
Haiti	2,635	48	2,682	1	)
Mexico	12,191	110	11,579	722	) 672
Nicaragua	7,832	-	7,832	0	)
Peru	55,302	645	47,664	8,283	)
Unspecified countries (those without individual prorations)	<u>5,919</u>	<u>0</u>	<u>5,802 ^{4/}</u>	<u>117 ^{5/}</u>	<u>)</u>
Total	113,280	1,398	104,972	9,706	

Liquid sugar

	wine gallons of 72 percent total sugar content			
Cuba	7,970,558	-	7,970,558	0
Dominican Republic	830,894	-	830,894	0
British West Indies	300,000	-	-	300,000

^{1/} Adjusted to include changes made in Amendment 3 to SR 811, effective 12-3-54.

^{2/} Marketed, entered, or certified for entry.

^{3/} By reason of Sec. 204(C) El Salvador may enter sugar to extent of basic quota even though deficit declared.

^{4/} Belgium, 335; British Guiana, 166; Canada, 996; China (Formosa), 1,113; Costa Rica, 1,036; Hong Kong, 6; Netherlands, 1,037; Panama, 1,113; Also entered under Sec. 212, 10 tons each: Denmark, Germany, and United Kingdom.

^{5/} Applications being held awaiting availability of quota comprise: Belgium 243; China(For.) 1,792; Costa Rica 1,358; Denmark 1,164; Hong Kong 12; Netherlands 2,153; Panama 1,057; Total 7,779.

Table 13.- Comparison of charges to quotas and offsets to drawback of duty
January - November 1953 and 1954

(Short tons, raw value and percentage)

Area	1953	1954	Increases		Decreases	
	Tons	Tons	1953 to 1954	Percent	1953 to 1954	Percent
			Tons	Percent	Tons	Percent
Domestic beet	1,495,181	1,615,471	120,290	8.0	-	-
Mainland cane	430,019 ^{1/}	457,638 ^{2/}	27,619	6.4	-	-
Hawaii	1,051,251	964,685	-	-	86,566	8.2
Puerto Rico	1,090,102	1,010,784	-	-	79,318	7.3
Virgin Islands	12,250	4,275	-	-	7,975	65.1
Republic of the Philippines	926,727	973,952	47,225	5.1	-	-
Cuba	2,716,442	2,674,891	-	-	41,551	1.5
Other foreign countries (see below)	114,800	104,972	-	-	9,828	8.6
Total	7,836,772	7,806,668	-	-	30,104 ^{3/}	0.4 ^{3/}
Foreign countries other than Cuba and Republic of the Philippines						
Dominican Republic	30,120	29,413	-	-	707	2.3
El Salvador	0	0	-	-	-	-
Haiti	2,662	2,682	20	0.8	-	-
Mexico	12,497	11,579	-	-	918	7.3
Nicaragua	8,105	7,832	-	-	273	3.4
Peru	55,637	47,664	-	-	7,973	14.3
Unspecified countries (those without individual prorations)	5,779	5,802	23	0.4	-	-
Total	114,800	104,972	-	-	9,828 ^{3/}	8.6 ^{3/}

Liquid sugar

wine gallons of 72 percent total sugar content

Cuba	8,004,815	7,970,558	-	-	34,257	0.4
Dominican Republic	808,106	830,894	22,788	2.8	-	-
British West Indies	-	300,000	-	-	-	-

^{1/} Revised.

^{2/} November 1954 estimated same as November 1953.

^{3/} Net decrease.

Table 14.- Status of 1954 sugar quotas as of December 20, 1954

Area	Quota	Credit for drawback of duty	Charge to quota and offset to drawback of duty 1/	Unfilled balance	
				Total	Within direct consumption limits for offshore areas
short tons, raw value					
Domestic beet	1,800,000	-	1,721,045 2/	78,955	-
Mainland cane	500,000	-	485,000 2/	15,000	-
Hawaii	1,052,000	-	1,042,509	9,491	0
Puerto Rico	1,080,000	-	1,064,987	15,013	315
Virgin Islands	12,000	-	10,523	1,477	-
Republic of the Philippines	974,000	0	974,000	0	0
Cuba	2,718,720	5,096	2,723,816	0	0
Other foreign countries (see below)	<u>113,280</u>	<u>1,605</u>	<u>114,716</u>	<u>169</u>	<u>61</u>
Total	8,250,000	6,701	8,136,596	120,105	-
Foreign countries other than Cuba and Republic of the Philippines					
Dominican Republic	29,401	598	29,996	3)	
El Salvador	0 3/	0	0	0)	
Haiti	2,635	48	2,682	1)	
Mexico	12,191	280	12,306	165)	61
Nicaragua	7,832	0	7,832	0)	
Peru	55,302	679	55,981	0)	
Unspecified countries (those without individual prorations)	<u>5,919</u>	<u>0</u>	<u>5,919 4/</u>	<u>0 5/)</u>	
Total	113,280	1,605	114,716	169	

Liquid sugar

wine gallons of 72 percent total sugar content				
Cuba	7,970,558	0	7,970,558	0
Dominican Republic	830,894	0	830,894	0
British West Indies	300,000	-	0	300,000

1/ Marketed, entered, or certified for entry.

2/ Estimated.

3/ See footnote 3, table 12.

4/ Belgium, 335; British Guiana, 166; Canada, 996; China (Formosa), 1,113; Costa Rica, 1,055; Hong Kong, 6; Netherlands, 1,133; Panama, 1,115.

5/ Applications being held awaiting availability of quota comprise: Belgium, 243; China, (Formosa), 2,382; Costa Rica, 2,165; Denmark, 1,164; Hong Kong, 15; Netherlands, 2,057; Panama, 1,055; Total, 9,081.

Table 15.- Deliveries of sugar by primary distributors by states
September 1954

State	Cane sugar refiners	Beet sugar processors	Importers of direct-consump- tion sugar	Mainland cane sugar mills	Total
100-pound bags, refined equivalent					
Ala.	218,640			1,527	220,167
Ariz.	24,594	14,793			39,387
Ark.	104,452	1,000			105,452
Calif.	665,445	864,015	78		1,529,538
Colo.	7,362	87,649	96		95,107
Conn.	116,160		3,580		119,740
Del.	14,206				14,206
D. C.	65,223		2,950		68,173
Fla.	100,795		73,095	2,878	176,768
Ga.	289,538		44,421	9	333,968
Idaho	6,319	48,857			55,176
Ill.	515,693	687,270	800	15,996	1,219,759
Ind.	327,041	92,998	4,907		424,946
Iowa	70,307	116,933			187,240
Kans.	52,856	95,907			148,763
Ky.	171,651			2,000	173,651
La.	334,117			1,063	335,180
Maine	64,553		1,205		65,758
Md.	272,268		50,882		323,150
Mass.	468,062		27,855		495,917
Mich.	220,770	206,323	26,455		453,548
Minn.	30,633	168,366			198,999
Miss.	146,479				146,479
Mo.	259,350	113,094			372,444
Mont.	2,318	38,498			40,816
Nebr.	13,261	119,236			132,497
Nev.	6,859	1,027			7,886
N. H.	27,426				27,426
N. J.	608,134		14,845		622,979
N. Mex.	11,074	15,087			26,161
N. Y.	1,441,032	32,800	195,945		1,669,777
N. C.	261,969		71,620		333,589
N. Dak.	3,443	37,345			40,788
Ohio	678,624	52,624	22,518		753,766
Okla.	98,369	43,419		192	141,980
Ore.	45,086	124,515	29,794		199,395
Pa.	896,397		235,054	25	1,131,476
R. I.	53,492		200		53,692
S. C.	139,901		16,483		156,384
S. Dak.	2,996	43,352			46,348
Tenn.	267,640		2,360	330	270,330
Tex.	491,557	106,090	20,405		618,052
Utah	7,042	67,002			74,044
Vt.	18,999		10,316		29,315
Va.	220,353		67,507		287,860
Wash.	76,499	185,330	26,751		288,580
W. Va.	117,044		9,469		126,513
Wis.	129,338	133,437			262,775
Wyo.	1,305	17,796			19,101
Total	10,166,672	3,514,763	959,591	24,020	14,665,046

Table 16.- Deliveries of sugar by primary distributors by states
Third Quarter 1954

State	Cane sugar refiners	Beet sugar processors	Importers of direct-consump- tion sugar	Mainland cane sugar mills	Total
100 pound bags, refined equivalent					
Ala.	701,951	-	1,200	4,828	707,979
Ariz.	75,764	47,533	-	-	123,297
Ark.	332,856	1,800	-	263	334,919
Cal.	2,267,252	2,585,932	618	-	4,853,802
Col.	25,564	244,339	288	-	270,191
Conn.	317,295	-	19,026	-	336,321
Del.	47,331	-	800	-	48,131
D. C.	195,414	-	9,703	-	205,117
Fla.	301,614	-	443,109	4,077	748,800
Ga.	1,015,449	-	281,354	9	1,296,812
Idaho	18,051	128,939	-	-	146,990
Ill.	1,351,601	1,532,985	800	96,752	2,982,138
Ind.	906,767	182,329	48,767	3,931	1,141,794
Iowa	212,422	336,554	-	-	548,976
Kans.	133,904	290,936	-	-	424,840
Ky.	633,634	-	21,692	9,920	665,246
La.	1,036,708	-	-	14,366	1,051,074
Maine	205,839	-	4,937	-	210,776
Md.	847,012	-	188,487	-	1,035,499
Mass.	1,212,369	-	74,927	-	1,287,296
Mich.	538,819	644,088	124,710	1,600	1,309,217
Minn.	103,788	388,809	-	-	492,597
Miss.	463,649	-	-	1,554	465,203
Mo.	788,093	286,359	-	-	1,074,452
Mont.	4,982	107,365	-	-	112,347
Nebr.	29,986	326,114	-	-	356,100
Nev.	19,045	4,195	-	-	23,240
N. H.	91,424	-	2,300	-	93,724
N. J.	1,787,938	-	48,844	-	1,836,782
N. Mex.	34,654	48,938	-	-	83,592
N. Y.	4,176,741	61,800	651,644	-	4,890,185
N. C.	843,912	-	313,876	-	1,157,788
N. Dak.	9,308	94,928	-	-	104,236
Ohio	1,897,204	112,117	104,196	572	2,114,089
Okla.	290,639	111,025	-	547	402,211
Ore.	159,929	353,403	98,147	-	611,479
Pa.	2,648,242	-	754,623	71	3,402,936
R. I.	150,641	-	1,600	-	152,241
S. C.	452,407	-	48,652	-	501,059
S. D.	8,507	94,998	-	-	103,505
Tenn.	910,518	-	13,330	4,253	928,101
Texas	1,551,909	283,860	55,107	219	1,891,095
Utah	28,114	200,331	-	-	228,445
Vt.	59,079	-	25,516	-	84,595
Va.	671,294	-	270,569	1	941,864
Wash.	218,684	567,445	115,666	-	901,795
W. Va.	389,303	-	40,406	-	429,709
Wis.	426,294	311,550	-	1,081	738,925
Wyo.	3,949	46,549	-	-	50,498
Total	30,597,849	9,395,221	3,764,894	144,044	43,902,008